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Developing a Knowledge Management Strategy

A knowledge management (KM) strategy is simply a plan that describes how an organization will manage its knowledge better for the benefit of that organization and its stakeholders. Program directors and management teams can use this article to establish a knowledge management strategy. The article provides a brief overview of the benefits of a KM strategy and the processes required to conduct a knowledge audit and a suggested outline for implementing a KM strategy.

Developing a Knowledge Management Strategy

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What is a knowledge management strategy?

A knowledge management strategy is simply a plan that describes how an organisation will manage its knowledge better for the benefit of that organisation and its stakeholders. A good knowledge management strategy is closely aligned with the organisation's overall strategy and objectives.

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What are the benefits?

A good, clear knowledge management strategy can help to:

- increase awareness and understanding of knowledge management in your organisation
- articulate the business case and identify potential benefits
- gain senior management commitment
- attract resources for implementation
- communicate good knowledge management practice
- give you a clear, communicable plan about where you are now, where you want to go, and how to plan to get there
- give you a basis against which to measure your progress.

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How do I go about it?

There are many ways to approach the development of a knowledge management strategy, as well as many ways of presenting the strategy document itself – there is no 'one size fits all'. Larger organisations will probably need a detailed, formal strategy document whereas for a smaller organisation something briefer and less formal might be more appropriate.

The strategy document

As a general guideline, a strategy of any kind tends to include answers to three key questions: where are we now, where do we want to be, and how do we get there? A relatively brief and informal knowledge management strategy might be structured around these three questions and include things like:

1. **Where are we now?** - An assessment of the current situation. How does current knowledge management practice (or lack of it) affect the organisation's ability to meet its goals? How does it affect the effectiveness of individuals and teams? To what extent do the organisation's culture, processes and systems currently act as enablers of, or barriers to, good knowledge management practice?
2. **Where do we want to be?** – An outline of what knowledge management will do for the organisation. How will it help the organisation and the people in it to meet their objectives? What might 'good knowledge management practice' look like for this organisation specifically? How will you know when you are there i.e. how will you measure the progress and value of your efforts?
3. **How do we get there?** – Describing the specific actions that will be taken to get to where you want to be. An action plan covering the three key elements of people, processes and technology: what specific knowledge management tools and processes will you use; how will you motivate people and realign your organisational culture to a 'knowledge friendly' one; and how will you develop the supporting technological infrastructure? Also needs to include details of resources required, deliverables, timescales and responsibilities.

For the larger organisation requiring a more formal and detailed strategy, David Skyrme (see 'Resources and references' below) suggests the following format:

Executive summary – no more than 1-2 pages.

Background – giving sufficient context about what initiated this strategy and where this document fits within the wider context.

The case for knowledge management - starting with your organisation's definition of knowledge management, then explaining the contribution that better knowledge management will make to your organisation, based on core organisational objectives.

Current knowledge management situation - highlight existing knowledge management activities and experience, outlining the benefits and explaining how these can be built upon; expose barriers to further progress.

Stakeholders' challenges and knowledge needs - summarise the key issues

and knowledge needs of the organisation and relevant stakeholders (e.g. leaders, staff, patients, relevant NHS and government authorities etc); include an assessment of the existing quality and accessibility of knowledge resources.

Knowledge management vision and strategy overview - it is often useful to encapsulate an inspiring vision and mission in one or two sentences each; this is followed by some key knowledge management objectives.

Details of strategy – outline the list of activities and projects to be implemented; it is useful to group these into specific themes or areas of action; typical themes might include: knowledge management tools and techniques; people and cultural aspects; knowledge management skills development; technology; leadership and governance (who will own and drive the strategy); communications (how will the strategy be promoted and rolled out); and measurement (how will performance and progress be measured).

Action plan – give details of deliverables, timescales, resources and budgets required for all actions, and reiterating the benefits.

Dependencies - highlight critical dependencies such as the availability of key personnel, approval of budgets etc; also spell out the impact of 'doing nothing'.

Conclusions/Next Steps - a simple outline of what needs to happen next to move the agenda forward and translate the strategy into action.

Appendices - typical appendices might include the findings of a knowledge audit, some background material on knowledge management such as definitions, summaries of any existing knowledge management projects or initiatives, etc.

Developing your strategy

In developing a knowledge management strategy, various practitioners offer a range of tips, some of which are outlined here:

Start with your organisation's strategy and objectives

The most important factor in guiding a knowledge management strategy is the organisation's overall strategy and goals. Given that the whole purpose of knowledge management is to help the organisation to achieve its goals, the knowledge management strategy should describe precisely that. In order to do that, you need to understand what your organisational goals are, and how you are currently performing against them.

Talk to key people throughout your organisation about strategy and goals. Look at what various departments or functions are doing. Discuss plans for the future, and look at factors that influence reaching goals. Get a feel for how sub-optimal knowledge management might be currently limiting the organisation in achieving its goals, and how better knowledge management might help it to achieve them.

Look for gaps that could prevent the organisation from achieving its goals. As you talk to people, be on the look out for the issues that are really causing them problems – their 'pains'. As well as problems, look also for opportunities – not only the chance to fix things, but the chance to do something new or better. Needs, problems, pains and opportunities give you an opening to use knowledge

to make a difference.

As well as being an integral part of the wider organisational strategy, a knowledge management strategy should also be coherent with human resources and information technology strategies.

Conduct a knowledge audit

A knowledge audit is an investigation into an organisation's knowledge management 'health'. A typical audit will look at:

- What are the organisation's knowledge needs?
- What knowledge assets or resources does it have and where are they?
- What gaps exist in its knowledge?
- How does knowledge flow around the organisation?
- What blockages are there to that flow?
- To what extent do its people, processes and technology currently support or hamper the effective knowledge management?

The knowledge audit can reveal the organisation's knowledge management needs, strengths, weaknesses, opportunities, threats and risks. It provides an evidence-based assessment of where the organisation needs to focus its knowledge management efforts.

Think about people, processes and technology

When planning your approach to knowledge management, be sure to address each of the three key aspects of people, processes and technology. It is often said that any knowledge management strategy that does not incorporate all three is destined to fail.

Think about capturing versus connecting

A key decision in developing your strategy and in selecting knowledge management tools and techniques involves looking at the relative focus on explicit and tacit knowledge – in other words, do you want to focus on connecting people with information, or on connecting people with people? Of course this is not an 'either/or' decision and most knowledge management strategies tend to involve a combination of the two; the optimal balance between them will depend on your organisational context.

Balance a long-term vision with quick wins

A good strategy will reflect a balance between 'quick-wins' and building a sustainable knowledge management capability into the long-term. The advantage of quick wins is that they allow people to see immediate benefits, and therefore they are more likely to give their support.

As well as seeking a number of quick wins, try not to be over-ambitious in the short to medium-term. Avoid long lists of things to do. You cannot change an organisation culture and ingrained work habits overnight. Pick a few core activities where you can make a difference, and prioritise and focus on those. At the same time, do keep your long-term vision in view.

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What's in it for me?

Gaining support and acceptance for your strategy and ultimately embedding knowledge management into the organisation is about winning 'hearts and minds'. Think constantly about addressing the "what's in it for me?" question that those whose contribution is needed will invariably ask (and even if they don't ask it in so many words, you can be fairly sure they are thinking it). Always anticipate that question from all of those involved – senior managers, budget-holders, middle managers, staff, patients, those departments and functions whose support you will need such as human resources and information technology. In answering the "what's in it for me?" question, consider the three key levels of 'me': myself, my team/department/function, and my organisation as a whole.

Build the evidence with pilots

The vast majority of knowledge management practitioners who have learned from direct experience strongly recommend using a pilot project as a 'test bed' before launching any new knowledge management initiatives. Pilots have a number of advantages: they allow you to test an approach with a small group of users to find what works and what doesn't, and to refine your approach and 'get it right' before rolling out across the wider organisation. This means that when rolling out, you already have evidence to demonstrate that what you are advocating actually works in practice. Similarly, your learning and 'mistakes' have taken place in a contained environment, so they will not have a negative impact on the organisation as a whole's view of knowledge management. You are therefore strongly advised to build pilot projects into your knowledge management strategy before seeking to launch any major new initiatives.

Are there any other points I should be aware of?

- It is important to define precisely what knowledge management means for your organisation. There is no single agreed definition 'out there' and given that knowledge management as a concept essentially borrows from a range of other disciplines, there is a great deal of misunderstanding about what is actually involved. People from an information management background might have one view, those working in information technology will tend to have another, those in human resources another still, etc. A clear and common understanding of what it means in your organisation is therefore essential.
- Don't think you have to wait until you have a knowledge management strategy in place before you can 'do' knowledge management. More often than not, knowledge management initiatives begin before there is a strategy. In fact many practitioners actively advocate it, believing that a strategy only becomes appropriate once knowledge management initiatives have 'had their honeymoon period' and are ready to be formally organised and endorsed.
- A common mistake is a strategy that is too theoretical and 'dry'. Many knowledge management strategies read as if they have come straight from a textbook (and some probably have). Your strategy needs to be 'real', written in the language of your organisation, and relevant to your organisation's situation. Similarly, be creative in making it interesting and bringing it alive.

- Again, don't forget the 'what's in it for me' question. Clearly demonstrate the benefits of knowledge management throughout your strategy. How will it reduce costs and time, improve performance, increase efficiency, reduce risk, etc? Use real examples.

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Resources and references

Books and guides

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